

## INFORMATION TECHNOLOGY (IT) PURCHASE ESTIMATE (PE) PREPARATION & SUBMISSION CHECKLIST

The following check list has been prepared to assist you in the preparation and submittal of your IT PE (Std. 66) requests to the Procurement Division (PD), One Time Acquisitions (OTA) unit.

		✓
Purchase Estimate (Std. 66)	Completed and signed.	
Mission Critical Certification w/signatures	Must be signed (wet signature) by Agency Secretary or Director or authorized designee and submitted with PE.	
Internal IT Approval	Desktop Mobile Computing Justification Form (DMC) <b>or</b> E-mail document showing internal IT approvals.	
Feasibility Study Report (FSR), ITPP included, with approval signatures and FSR number	For IT Projects - Submit FSR/ITPP, documentation of scope, costs, benefits, schedules and methodologies. For IT projects over \$1,000,000.00, departments must provide a copy of the approved FSR/ITPP section 5.  Refer to: State Contracting Manual (SCM) Volume 3, Ch. 2 Topic 4. Refer to CTA letters** TL 12-1 & TL 12-17 (if FSR review is applicable e-mail sections 1-5 to <a href="mailto:TABFSRs@dgs.ca.gov">TABFSRs@dgs.ca.gov</a> ).	
GC 19130(b) Justification (STD 215 or equivalent) and proof of submittal to DPA (personal services only)	<a href="http://www.documents.dgs.ca.gov/pd/delegations/pac041808.htm">http://www.documents.dgs.ca.gov/pd/delegations/pac041808.htm</a> Refer to: SCM Volume 3 Section 2.B4.3 Contracted Services	
CSSI Exemption Form	<a href="http://www.documents.dgs.ca.gov/pd/poliproc/ITHardwarePCGoodsExemptionContractProcessedJustificationv2.2.doc">http://www.documents.dgs.ca.gov/pd/poliproc/ITHardwarePCGoodsExemptionContractProcessedJustificationv2.2.doc</a>	
Statement of Work (SOW)	Written description of work to be performed. Word format. Refer to SCM Volume 3 Section 2.B5.1	
Proprietary Letter or Sole Source letter	If applicable - Current letter on company letterhead from manufacturer/supplier, addressed to State Agency, dated and signed.	
Price Quote	Manufacturer or Supplier's price quote.	
Prior Purchase Order	Copy of prior PO if request is for a renewal of services or like items.	
Small Business (SB) or Disabled Veteran Business Enterprise (DVBE) Market Research	If \$5,000 - \$250,000 (if applicable). Refer to Government Code (GC) Section 14838.5 (a) and (b)	
Limit to Brand Statement (GSPD-08-001)	If applicable. For goods only.	
Non-Competitively Bid (NCB) Contract Justification ( GSPD-09-007)	If applicable. Include Market Analysis documentation, Supplier's List Pricing and Supplier's Quote.	
Property Survey Report Form (Std.152)	Trade in of state property if applicable.	
Cost Worksheet	For more than 10 line items if applicable.	

**\*\*Link to all TL letters:** [http://www.cio.ca.gov/Government/IT\\_Policy/TL.html](http://www.cio.ca.gov/Government/IT_Policy/TL.html)